

## How to Change the Enrollment Date and/or Exit Date

Follow the instructions below to change the enrollment date and/or exit dates if a client's enrollment date or exit date does not reflect the actual date of enrollment or exit.

**PLEASE NOTE: IF THE CLIENT HAS BEEN EXITED FROM THE PROJECT AND 90 DAYS HAVE PASSED SINCE THE EXIT DATE, THE SYSTEM WILL NOT ALLOW YOU TO EDIT THE PROJECT START DATE OR PROJECT EXIT DATE.**

### Editing the Enrollment Date

1. Login into ClientTrack and **click on the loop icon to find a client** as shown below and type in the first couple of letters of the client's first and last name and/or any other personal identifiable information available such as date of birth or social security number. Then click **"Search"**. You will see a list of clients display on the screen; **click next to the name of the client you want to edit** as shows by the red arrow below.

The screenshot shows the ClientTrack web application. On the left is a dark blue sidebar with a 'Find Client' icon (a magnifying glass over a person) highlighted with a red box. The main content area has a light blue header with a search bar and a breadcrumb 'Clients / ClientTrack Form'. Below the header, there's a client summary for 'Gummy Bear' with fields for Social Security Number (312-98-0478) and Client ID (1048318). The 'Find Client' section contains a search form with fields for First Name (gu), Last Name (be), Middle Name, Full Name (Last, First), Social Security Number, Birth Date (MM/DD/YYYY), and Client ID. Below the search form, it says '1 result found.' and displays a table with the following data:

First Name	Last Name	Middle Name	SSN	Birth Date
Gummy	Bear		XXX-XX-0478	02/26/2000

A red arrow points to the 'Gummy' cell in the 'First Name' column of the table.

2. Go to the head of household's client record and **click on the three dots** next to the enrollment you wish to edit found on the client dashboard under "[Client name] Enrollments". From the drop-down menu, select **"Edit Enrollment"** as shown below.

Clients / Client Dashboard

Chewy Bear 10/19/2014 Social Security Number 466-32-7282 Client ID 1048319

Ethnicity: Non-Hispanic/Non-Latin(a)(o)(x) Race:

### Chewy's Enrollments

2 results for

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date
Active PH - Rapid Re-Housing My Fake Organization CoC RRH (RRH-	2	09/06/2022	
Add Household Member View Case Members Exit the Enrollment <b>Edit Enrollment</b> Edit Project Entry Workflow Review Entry Assessments Update/Annual Assessment	2	06/06/2022	

- Edit the enrollment date in the box labeled **"Start Date"** as shown in the image below. Finally, click "Save" at the bottom right-corner of the screen.

Clients / Client Dashboard / ClientTrack Form

Chewy Bear 10/19/2014 Social Security Number 466-32-7282 Client ID 1048319

### HMIS Enrollment

Case: Bear, Gummy

Project: My Fake Organization CoC RRH (RRH-R8)

Enrollee: Bear, Chewy

Relationship to HoH: Son

Start Date: \* 09/06/2022

Exit Date: MM/DD/YYYY

+ Family Member Exit Enrollment

## Editing the Project Exit Date

Besides changing the enrollment date for a client, you can also change the exit date of an enrollment. In order to change the exit date of an enrollment for a client, please follow the steps below.

1. Go to the head of household's client record by following the previous step 1.
2. Go to the head of household's client record and **click on three dots next to the enrollment** you wish to edit found on the client dashboard under "[Client name] Enrollments" shown in the image below. Once the drop-down menu appears, click on **"Edit Exit Workflow"**.

The screenshot shows the 'Client Dashboard' for a client named 'Chewy Bear'. The client's Social Security Number is 466-32-7282 and the Client ID is 1048319. The dashboard displays 'Chewy's Enrollments' with 2 results found. The table lists two enrollments: 'My Fake Organization Coordinated Entry (R1a)' and 'My Fake Organization CoC RRH (RRH-...)'. The 'Edit Exit Workflow' option is highlighted in the dropdown menu for the first enrollment.

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Project Exit Date
My Fake Organization Coordinated Entry (R1a)	2	06/06/2022		09/06/2022
My Fake Organization CoC RRH (RRH-...)	2	09/06/2022		11/04/2022

3. Edit the exit date in the box labeled **"Exit Date"** and click **"Save"** at the bottom right-corner of your screen.

**HUD Program Exit**

Chewy Bear 10/19/2014 Social Security Number 466-32-7282 Client ID 1048319

**Enrollment Exit**

To exit the client from the Enrollment, enter the Exit Date and Destination.

Exit Date: 11/04/2022

Destination: Rental by client in a public housing unit

Exit Reason: Completed Program

Case Manager Assignment: Lori Wood

End Case Assignment: ☐

**Save**

Please contact the HMIS Help Desk by emailing [HMISHelpDesk@ihcda.in.gov](mailto:HMISHelpDesk@ihcda.in.gov) or [DVHelpDesk@ihcda.in.gov](mailto:DVHelpDesk@ihcda.in.gov) if you need any- assistance with changing an enrollment or exit date for a client.